



Virginia Healthcare Workforce Briefs

Indicators from the Bureau of Labor Statistics' Current Employment Statistics Survey

Series 2: Regional & Sectoral Employment

Series 2, Issue 20 August 2013

Regional Employment Growth 2 Regional HC&SA Share 3 Subsector Employment Growth 3 Subsector HC&SA Share 4 Region Map 5 About the Data 6

Data in this report is not seasonally adjusted. HC&SA data includes employees of private firms only. Self-employed persons, including health professionals in private practice, are not included.

Highlights ◆ Data in tl

- Data in this series is not seasonally adjusted and exhibits short-term volatility from fluctuations in holidays, weekends, weather and other seasonal factors. Estimates for the most recent month are preliminary.
- ♦ According to preliminary estimates, Virginia's HC&SA sector gained 600 jobs in June. Virginia's HC&SA sector has only gained 400 jobs YTD. However, YOY growth is robust, with 10,600 jobs added since July 2012. Employment in the HC&SA sector reached an unusually high peak in Dec 2012 accounting for the disparity.
- Similarly, YTD growth in all of Virginias regions has been anemic and volatile. On a YOY basis, however, growth has been positive in all regions. Richmond and Hampton Roads, in particular, have experienced YOY growth above 4%. Growth has been slower in Northern Virginia, where the HC&SA sector lags the rest of the economy.
- Subsector employment has experienced similar divergence in YTD & YOY results.
 YTD, Social Assistance & Nursing & Residential Care Facilities have experienced job losses.
- Over the past 10 years, HC&SA employment has been increasingly weighted towards Ambulatory Services and Social Assistance and away from Hospitals & Facilities.

Data in Brief

	Employment, in Thousands				Growth Rate, Annualized			
Not Seasonally Adjusted*	July 2012	Apr 2013	June 2013	July 2013	12 Month	3 Month	1 Month	
Virginia								
Total Nonfarm	3719.6	3764.5	3796.5	3774.9	1.5%	1.1%	-6.6%	
Health Care & Social Assistance	392.8	403.3	402.8	403.4	2.7%	0.1%	1.8%	
Virginia Beach, Norfolk, Newport News								
Total Nonfarm	749.1	755.0	768.o	770.1	2.8%	8.2%	3.3%	
Health Care & Social Assistance	82.7	85.3	86.7	86.6	4.7%	6.2%	-1.4%	
Northern Virginia								
Total Nonfarm	1,354.4	1,368.1	1,389.2	1,380.2	1.9%	3.6%	-7.5%	
Health Care & Social Assistance	109.6	111.6	110.5	110.7	1.0%	-3.2%	2.2%	
Richmond								
Total Nonfarm	625.2	631.5	635.3	630.5	0.8%	-0.6%	-8.7%	
Health Care & Social Assistance	77.9	81.2	81.1	81.2	4.2%	0.0%	1.5%	
Rest of Virginia								
Total Nonfarm	990.9	1,009.9	1,004.0	994.1	0.3%	-6.1%	-11.2%	
Health Care & Social Assistance	122.6	125.2	124.5	124.9	1.9%	-1.0%	3.9%	

Preliminary estimates are italicized

^{*}Seasonally adjusted data is adjusted by the Bureau of Labor Statistics to account for weather and other seasonal changes. Since the US Bureau of Labor Statistics does not provide seasonally adjusted data at this level, this series uses **non**-seasonally adjusted data exclusively. Seasonal variation may account for some of the variation in time series data. When comparing data in this series to other HWDC series or other publications it is important to note whether the data reported has been seasonally adjusted.

Regional HC&SA Employment Growth, Level

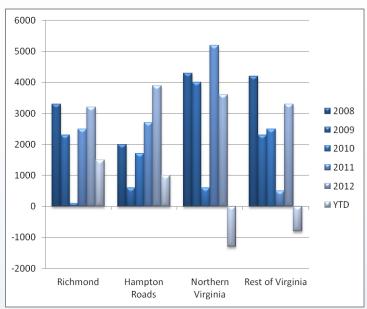


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Change from Dec to Dec).

Virginia's HC&SA sector added 600 jobs in July on a non-seasonally adjusted basis, while June's preliminary estimate remained unchanged. Thus far in 2013, Virginia's HC&SA sector has added 400 jobs on a non-seasonally adjusted basis. Although only a little more than halfway through 2013, this is still an extremely low figure for the first seven months of a calendar year. Part of the reason for this is that HC&SA employment peaked in December 2012, with more than 8,000 jobs than existed in September. The sector then lost over half of those gains in January. Nevertheless, HC&SA employment growth has been volatile in 2013 and the sector has struggled to hold onto gains.

Geographically, HC&SA job growth has also been scattered. Hampton roads has added 1,000 jobs in 2013 and Richmond is on pace to match last years high gains. Northern Virginia and the Rest of Virginia, however, have experienced job losses in the HC&SA sectors. In July, the HC&SA sector in Northern Virginia added 200 jobs, 100 jobs in Richmond and 400 in the Rest of Virginia. Hampton Roads lost 100 jobs.

Year-Over-Year Regional Employment Growth

Despite showing only sporadic growth thus far in 2013, Virginia's HC&SA sector has experienced robust growth year-over-year. Virginia's HC&SA sector support 10,600 more jobs than it did one year ago, good enough for a 2.7% annualized growth rate. However this is not likely to continue unless the sector repeats the robust growth it experienced last fall, which is not a usual pattern. On a year-over-year basis all regions of Virginia have experienced strong job growth in their HC&SA sectors, but Richmond and Hampton Roads have outperformed other regions with year-over-year growth exceeding 4%. The HC&SA sector is outperforming the rest of the economy in all regions except Northern Virginia, where it lags by a full 100 basis points.

Figure 2: Year-Over-Year Employment Growth (Not Seasonally Adjusted).

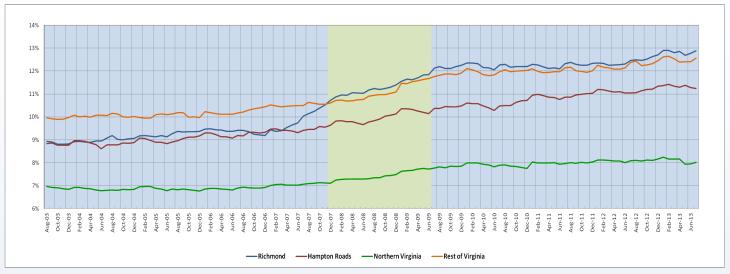




Series 2, Issue 20 Page 3

Regional Share of 12-month Growth

Figure 3: HC&SA Share of Employment by Region, Not Seasonally Adjusted.

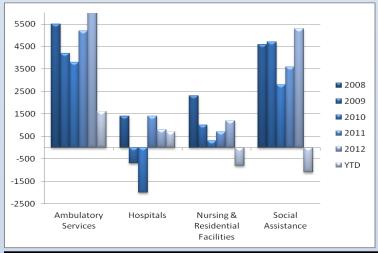


Even with slow and volatile growth in 2013, Virginia's HC&SA sector has managed to maintain or even increase its importance for employment in all regions of Virginia year-to-date. On a year-over-year basis, only Northern Virginia's HC&SA sector has seen it's share of employment decline, and only by 7 basis points (0.07%). Richmond, Hampton Roads and the Rest of Virginia all saw their shares increase over the same period, by 42, 21 and 19 basis points, respectively. This mirrors the experience of 2001, where the HC&SA sector did not give back employment share following sharp gains through the recession. The HC&SA sector now accounts for more than 12% of jobs in Richmond and the Rest of Virginia, more than 11% in Hampton Roads and more than 8% in Northern Virginia.

Subsector Employment Growth

Three of Virginia's four HC&SA subsectors, Ambulatory Care, Hospitals and Social Assistance, had positive job growth in July, while employment growth in Nursing & Residential Care Facilities was flat for the month. June's preliminary estimates for Ambulatory Care and Hospitals were revised downward by 200 and 400 jobs respectively, while estimates for Social Assistance were revised upwards by 600 jobs. Estimates for Nursing & Residential Facilities were unchanged.

Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Dec. to Dec.)



As with regions, year-to-date job growth has been scattered and volatile in 2013. As of July, Ambulatory Services and Hospitals have experienced net, albeit subdued, job gains, while the other two sectors have experienced declines. Year-over-year growth, however, has been positive for all subsectors. Social Assistance has experienced particularly strong year-over-year growth of 6.2%. Nursing & Residential Facilities, however, have been mostly flat with only 0.57% year-over-year growth.

As with the HC&SA sector overall, the Social Assistance sector was particularly strong last fall. In fact, the Social Assistance sector accounted for more than half of the 8,000 jobs gained between September and December 2012. This accounts for much of the disparity between YTD and YOY results.

Distribution of Growth by Subsector

	Employment, in Thousands				Growth Rate, Annualized			
Not Seasonally Adjusted	July 2012	Apr 2013	June 2013	July 2013	12 Month	3 Month	1 Month	
Virginia								
Health Care & Social Assistance	392.8	403.3	402.8	403.4	2.7%	0.1%	1.8%	
Ambulatory Health Care Services	156.0	159.3	159.3	160.2	2.7%	2.3%	7.0%	
Hospitals	100.9	102.1	102.0	102.8	1.9%	2.8%	9.8%	
Nursing & Residential Care Facilities	69.8	69.8	70.2	70.2	0.6%	2.3%	0.0%	
Social Assistance	66.1	72.1	71.3	70.2	6.2%	-10.1%	-17.0%	
Virginia Beach, Norfolk, Newport News								
Health Care & Social Assistance	82.7	85.3	86.7	86.6	4.7%	6.2%	-1.4%	
Hospitals	20.3	21,1	21.2	21.3	4.9%	3.8%	5.8%	
Northern Virginia								
Health Care & Social Assistance	109.6	111.6	110.5	110.7	1.0%	-3.2%	2.2%	
Ambulatory Health Care Services	50.6	50.8	49.6	50.5	-0.2%	-2.3%	24.1%	
Hospitals	22.7	23.0	22.6	22.6	-0.4%	-6.8%	0.0%	

Preliminary estimates are italicized

Share of 12-Month Growth by Subsector

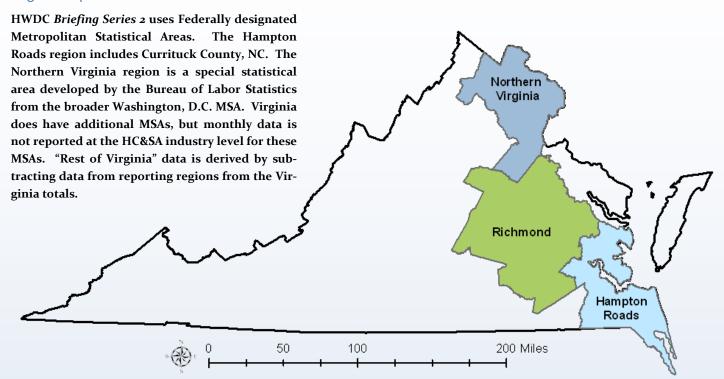
Statewide, Virginia's HC&SA sector has increased its share of employment by over 2% since 2002. However, this impressive gain only tells part of the story. Share of jobs has been shifting within the HC&SA sector itself. While all subsectors have experienced growing employment over the past 10 years, more of that growth has accrued to Ambulatory Services and Social Assistance than to Hospitals and Nursing & Residential Care Facilities. Since December 2012, Ambulatory Services have added over 50,000 jobs, raising its share of HC&SA employment in Virginia from 37.1% to 39.7%. However, the most impressive growth in share of HC&SA employment has been in Social Assistance. Although the subsector has added less than half of the number of jobs added in Ambulatory Services, its share of HC&SA employment has risen from 13% to 17.4% —a gain in share of almost 34%. Employment-wise, the Social Assistance sector is now the same size as the Nursing & Residential Care Facilities sector, with 70,200 jobs each. Both the Nursing & Residential Care Facilities and Hospital sectors have seen a loss of HC&SA employment share. Hospitals have lost over 5% of the share, declining from 30.7% of Figure 5: Total Employment by Subsector, 2002-2013 (Not Seasonally Adjusted). HC&SA jobs to only 25.5%.

180 160 Employees, in thousands 140 120 80 60 40 **Ambulatory Services** 37.07% 25.48% Hospitals 30.65% 17.40% **Residential Facilities** 40 13.00% Social Assistance 20 0 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 Current December

These changes in employment share may reflect long-term changes in the structure of Virginia's HC&SA sector. For instance, it may reflect a continuing trend away from institutional care in hospitals and other facilities and into community-based and outpatient care. Alternatively, share changes may be short-term, and reflect the increased ease with which large facilities can lower employment, government stimulus spending, safety net spending and/or other short-term effects from the recession and the slow recovery.

Series 2, Issue 20 Page 5

Region Map



Region Detail

Rich	ımond	Hampton Roads		
ES Richmond, V	(A (MSA 40060)	Virginia Beach-Norfolk-Newport News, VA-NC (MSA 47260)		
Caroline Charles City Chesterfield Cumberland Cumberland Cumberland	Cities Colonial Heights Hopewell Petersburg Richmond	Counties: Gloucester Isle of Wight James City Mathews Surry York Currituck, NC	Cities Chesapeake Hampton Newport News Norfolk Poquoson Portsmouth Suffolk Virginia Beach Williamsburg	
	Counties: Amelia Caroline Charles City Chesterfield Cumberland Dinwiddie Goochland Hanover Henrico King & Queen King William Louisa New Kent Powhatan Prince George	Counties: Cities Amelia Caroline Hopewell Charles City Petersburg Chesterfield Cumberland Dinwiddie Goochland Hanover Henrico King & Queen King William Louisa New Kent Powhatan Prince George	Counties: Cities Counties: Amelia Colonial Heights Gloucester Caroline Hopewell Isle of Wight Charles City Petersburg James City Chesterfield Richmond Mathews Cumberland Surry Olinwiddie York Goochland Hanover Currituck, NC Henrico King & Queen King William Louisa New Kent Powhatan Prince George	



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The Department of Health Professions Healthcare Workforce Data Center works to improve the data collection and measurement of Virginia's healthcare workforce through regular assessment of workforce supply and demand issues among the 80 professions and 350,000 practitioners licensed in Virginia by DHP.

The HWDC collects data on Virginia's licensed health professionals through surveys completed during the online license renewal and application process. Survey results and data may be accessed on our website: www.dhp.virginia.gov/hwdc/.

The HWDC also provides a series of Virginia Healthcare Workforce Briefs based data collected by the US Department of Labor's Bureau of Labor Statistics and the US Department of Commerce' Bureau of Economic Analysis.

Virginia Healthcare Workforce Briefs:

Series 1: State & National Employment (Monthly)

Series 2: Virginia Regional Employment (Monthly)

Series 3: Income & Compensation (Quarterly)

About the Data

Data in this report is from the US Department of Labor Bureau of Labor Statistics' Current Employment Statistics program. The CES program surveys about 140,000 businesses and government agencies monthly. Unless otherwise noted, this series uses data that is not seasonally adjusted. Seasonal variations related to weather, holidays, weekends, seasons and other predictable variations are apparent in the data. Short-term changes may be related to seasonal changes rather than underlying trends. Data from recent months is preliminary and subject to revision in future releases from the CES. Revisions will be reported in future editions of this series. Unless otherwise noted, the CES data presented in this series:

Includes:

- Data on employed individuals drawing a paycheck (payroll employees).
- All employees, regardless of role, occupation or hours worked.
- ♦ HC&SA employees in the private sector only.
- Persons employed by health professionals in private practice.
- Both government and private sector workers in nonfarm employment data.

Does not include:

- Self-employed workers or volunteers, including health professionals in private practice.
- ◆ HC&SA employees in the public sector. (These are counted as government workers in monthly reports. Approximately 54,500 of Virginia's public sector workers worked in the HC&SA sector in 2010 at the federal, state and local levels).
- Information on hours worked or the quality of employment.
- Government workers in HC&SA level data.
 (Government workers, regardless of occupation and role, are classified as public sector employees).